INTEGRATING

WORK

AND

LIFE

The Wharton
Resource Guide

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PREFACE

The idea for this book came from the Wharton Work/Life Roundtable, which has met formally three times since its inception in 1994. The mission of the Roundtable is to enhance the capacities of employees, managers, and their organizations to create change in managing work/life dilemmas. Participants (see lists below) have included thought leaders from business schools across the nation, representatives from private industry and the public sector, and work/life consultants. Through a series of events, participants have collaborated in researching, debating, and ultimately defining principles and actions needed for effectively integrating work and personal life.

The first Roundtable event took place in February 1994. Two of us, Stew Friedman, a Wharton faculty member, and Jessica DeGroot, then an MBA student at Wharton, were the organizers. We had been collaborators on the Wharton Life Interests Project, which aims to develop new knowledge about work and personal life, in part through longitudinal research on the evolving careers and personal lives of members of the Wharton community. We both had firsthand experience with the challenges of teaching and learning how to manage work/life dilemmas: Friedman, from teaching MBAs and executives about work/life issues, and DeGroot, from both a student's perspective and from her background as a work/life consultant. We convened a group of academics, work/life consultants, and representatives from major companies to begin a dialogue about these challenges. The primary focus was to develop an understanding of how to equip future business leaders for both their personal and managerial roles in integrating work and other life interests.

We quickly saw that there was much to learn about how to do this well. There was a great deal of useful dialogue and more than a few unanswered questions as academics, business leaders, and consultants debated the issues. One of the participants was Perry Christensen, then Director of Human Resource Strategy and Planning at Merck & Co., Inc. His passionate interest in, and urging for, a follow-up initiative quickly changed him from a participant in the first event to co-organizer of future events.

The second meeting took place a year later in February 1995. Its focus was to explore what people need to know in order to integrate work and personal life. We realized that if we were going to be successful in teaching and training, we needed to know more about what skills individuals and managers need to meet the complex challenge of integrating work and personal life. The second meeting focused on individuals. Participants came with data from their own experiences—as people struggling to achieve integration—and from their work as educators and leaders in the field. In addition, we required all invitees to interview two individuals wrestling with how to blend their work with some other central life interest. Participants then

worked in small groups to uncover similarities and differences between people who were successful or unsuccessful in integrating work and personal life. From this emerged the original draft statement of the individual skills and actions needed to effectively integrate work and personal life.

The focus of the third Roundtable meeting in February 1996 was to identify the skills that managers need in order to create environments within which employees can effectively integrate work and personal life. During the course of the two-day meeting, participants led a series of focus groups with managers from different companies and then discussed what managers need to know and do. From this dialogue emerged a list of managerial skills and actions, and the discovery of the three core principles that form the backbone of this guide.

These Roundtable events, and reactions to them (including press coverage by the *New York Times* and the *Wall Street Journal*), inspired us to pursue this book. We realized that there was a growing need for knowledge about the skills necessary to manage work/life dilemmas. We believed we could make a useful contribution to the work/life field by compiling what is known about how to create opportunities for people and organizations to learn more about how to put the principles and actions developed by the Roundtable into practice. So, we begin this book by outlining the three key principles and their associated actions. Then these actions are used to classify the set of learning activities that we edited after collecting them from leaders in the work/life field.

Looking ahead, we plan to continue the work of the Roundtable. All proceeds from sales of this guide will go toward supporting future Roundtable events. We are currently planning to organize focused dialogues on these topics:

- How to create change in organizations to make them both more friendly to personal life interests and more productive

- The role of the community as stakeholder and as partner in the process of change in the work/life field

- Industry-specific challenges in integrating work and personal life

We welcome your input and would like to do all that we can to share information about enhancing the capacity of employees, managers, and their organizations to create change in managing work/life dilemmas. Here's how to get in touch:

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ACKNOWLEDGMENTS

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INTRODUCTION

Stewart D. Friedman
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INTEGRATING WORK AND PERSONAL LIFE: THE WHARTON RESOURCE GUIDE

The Wharton Resource Guide represents the first collection of learning activities exclusively focused on improving employees' and managers' abilities to effectively integrate work and personal life. This groundbreaking collection promises to advance the work/life field in a number of ways.

In addition to being an exemplar collection of learning activities, this guide includes a framework developed through extensive field research that identifies the principles for effectively integrating work and personal life. Each learning activity has been classified using this framework. You will be able to use it to easily identify learning activities that focus on what either employees or managers need do to better integrate work and personal life.

The collection has been carefully crafted to include a wide variety of methods including role plays, case studies, self-assessments, and simulations. This thoughtful assortment of learning activities, descriptions of the principles for effective work/life integration, and careful classification of the content should make your search for the most appropriate activity easy and may even help you further clarify teaching or training goals.

Whether you are an experienced educator or trainer in the work/life arena, or completely new to the field, this guide will expand your repertoire and inspire creative ways to engage people in learning about integrating work and personal life.

FORMAT OF THE LEARNING ACTIVITIES

Each learning activity follows a carefully planned format allowing you to easily find and implement the activity of your choice. After the title and contributor, you will find a summary describing the main focus and process of the learning activity followed by a list of primary learning objectives.

The next items in the format provide information that will quickly familiarize you with the steps necessary for conducting the learning activity including recommended group size, a list of necessary handouts or other materials, and a brief overview of the timing and sequence of all steps. Each step is then carefully described and includes suggestions on ways to stimulate discussion, wordings to use to emphasize key concepts, and important points to address in closing remarks.

The format concludes with suggestions to maximize participation and a list of available resources that can enhance learning. When appropriate, we have included reproducible overheads and handouts at the end of the activities.

PRINCIPLES FOR EFFECTIVELY INTEGRATING WORK AND LIFE

Through extensive field research that included numerous individual interviews, manager focus groups, and widely distributed surveys, a framework was developed to identify the principles individuals and managers can use to effectively integrate work and personal life. Each learning activity has been classified using this framework.

The three principles of effective work/life integration are the following:

1. *Clarify What's Important.* Align personal life interests and the central vision of the firm to generate greater focus and power for collective action.

2. *Recognize and Support the Whole Person.* Take actions that recognize and support the whole person to build a foundation for flexibility and to strengthen commitment.

3. *Continually Experiment with the Way Goals Are Achieved.* Critically assess how things are done from a work/life perspective to help identify inefficiencies and generate creative solutions to business and personal dilemmas.

First, and perhaps most crucial, individuals and managers need to know what's important to them—from a business and personal perspective—and to act accordingly if they are going to effectively integrate work and personal life. Second, individuals and managers must take responsibility for building relationships and taking other actions that recognize and support what employees do—both at work and in their personal lives. Only by clarifying what's important and building this foundation will individuals and managers be able to accomplish the third principle and truly work together to identify solutions that improve business and personal dilemmas.

Each principle is expressed through a number of actions. For example, the individual employee and the manager must take responsibility for specific actions in order to apply the first principle, Clarify What's Important. In fact, only when acting in unison do they best realize this principle and move toward effective integration of work and personal life. The fact that concurrent actions from the individual and manager are required reflects the very nature of work/life integration, where lasting solutions come from simultaneously examining work and personal life.

See Exhibit 1 for a summary of the principles and associated actions required of individuals and managers. Most of the learning activities illustrate these principles. All activities engage participants in one or more of the specific actions either by facilitating a discussion about the importance of the action or by actually having participants apply the action while taking part in the learning activity. To help you identify learning activities that address specific actions, they have been classified by the actions they address.

Individual Actions	Principles	Managerial Actions
Clarify life priorities and examine choices puposefully Communicate needs and feelings; creatively negotiate to meet personal and company needs. Act in a way that is consistent with one's values.	**Clarify What's Important** *Aligning personal life interests and the central vision of a firm generates greater focus and power for collective action.*	Communicate clear vision, goals, and performance expectations. Listen, understand, and take action to meet diverse employee and business needs. Reward performance and productivity, not necessarily time spent working.
Proactively build relationships; create trust, goodwill, and common ground. Manage boundaries: understand how to integrate and separate different life roles.	**Recognize and Support the Whole Person** *Building relationships and valuing different life roles establish a foundation for flexibility and strengthen commitment.*	Build relationships among individuals and group members based on trust and respect. Model by living in accordance with one's own values and by supporting others to live by theirs. Value what employees bring to the business from their multiple life roles.
Experiment with new ways to meet competing priorities. Anticipate demands and plan effectively. Be flexible, creative, and spontaneous in work, family, and other life roles.	**Continually Experiment with the Way Goals Are Achieved** *Critically assessing how things are done from a work/life perspective can help identify inefficiencies and generate creative solutions to business and personal dilemmas.*	Seek and promote synergies between business and other life priorities. Question assumptions and encourage creative experimentation in the way work is done. Increase organization and employee flexibility through technology and other means. Manage organizational change in ways that support work, family, and community.

EXHIBIT 1. Principles for Effectively Integrating Work and Life.

INDIVIDUAL ACTIONS ASSOCIATED WITH THE WORK/LIFE PRINCIPLES

In order to apply the principles of effective work/life integration, individual employees must take responsibility for the actions associated with each principle. The following is a list of each individual action and its definition. Also included are examples illustrating how the action is addressed by different learning activities. To locate one of the learning activities used in the examples, you can reference the classification tables under the particular action of interest.

For individuals to apply the first principle, Clarify What's Important, they must:

- *Clarify life priorities and examine choices purposefully.* When individuals clarify what's important to them, it is easier to develop innovative solutions that satisfy multiple priorities and to select between options when a choice is required.

Participants frequently apply this action in learning activities by completing self-assessments or by assessing their reactions to different work/life scenarios. One learning activity uses a provocative debate to address this action, having participants argue the pros and cons of whether integrating work and life is even desirable.

- *Communicate needs and feelings; creatively negotiate to meet personal and company needs.* Individuals must work with people inside and outside of work to develop solutions that meet the needs of business and other life roles. In order to accomplish this, individuals must communicate their needs and offer potential solutions.

Learning activities use role plays, consensus decision making, and conflict resolution as just some of the ways to engage participants in effective communication and negotiating creative solutions.

- *Act in a way that is consistent with one's values.* When individuals search for ways to act on their values while keeping personal and business objectives in focus, win-win solutions frequently develop. When individuals are expected to act in a way that compromises their values, the best solution may require a more fundamental change (for example, changing where one works).

One of the methods used to introduce this action is to have participants compare their current use of time with their desired use of time. Other learning activities have participants read about people who role model an integrated life.

For individuals to apply the second principle, Recognize and Support the Whole Person, they must:

- *Proactively build relationships and create trust, goodwill, and common ground.* Individuals must build and maintain multiple relationships both at work and outside of work. By strategically developing a network of support, individuals increase access to a greater range of flexible solutions. By building and maintaining trust, individuals increase the number of people who believe in their ability to get the task done.

Role plays are often used as a way to apply this action, clearly demonstrating how building relationships is fundamental to developing work/life solutions. Another learning activity discusses the importance of developing support groups and is followed by an exercise defining the status of support currently available to participants.

- *Manage boundaries: understand how to integrate and separate different life roles.* Moving between different life roles can provide opportunities to transfer skills and knowledge or may result in moments of increased friction. Clarifying the differences and similarities between life roles can amplify the opportunities and minimize the conflict.

Many of the learning activities that address this action have participants map out their different life roles as a way to address this action. Another activity has participants reflect on a variety of work/life situations and then asks them what would be an appropriate or inappropriate response. Yet another activity focuses on career planning as a way to explore this boundary.

For individuals to apply the third principle, Continually Experiment in the Way Goals Are Achieved, they must:

- *Experiment with new ways to meet competing priorities.* Striving to meet competing priorities may require individuals to challenge old ways of accomplishing goals. Individuals need to evaluate old habits and experiment with new ones, for example, by no longer demanding perfection in low-value activities, by becoming comfortable with a certain amount of ambiguity, or by learning to let go of control and to delegate.

A number of learning activities require participants to apply this action by addressing priorities that compete for attention in their lives.

- *Anticipate demands and plan effectively.* When individuals plan in advance, they minimize the potential for problems. Advance planning in work and other life roles also increases an individual's potential to develop solutions that satisfy multiple responsibilities.

Participants frequently apply this action as they visualize a life plan or hear about issues that others face in their lives. Other learning activities have participants actually chart the time they will spend on different life roles over the next thirty years.

- *Be flexible, creative, and spontaneous in work, family, and other life roles.* Even with advance planning, individuals who engage in multiple life roles increase the potential of unexpected changes. Those who are flexible increase their potential for solving unplanned conflicts and surfacing unexpected benefits.

Role plays are often used to encourage participants to look for unanticipated options. Another learning activity asks participants to chart or reflect on past and future work/life events and then identify moments where the best balance was between work and personal life.

MANAGERIAL ACTIONS ASSOCIATED WITH THE WORK/LIFE PRINCIPLES

The following lists the actions for which managers must take responsibility in order to apply the principles of effective work/life integration. These are followed by a definition and a brief description of how different learning activities address these actions.

For managers to apply the first principle, Clarify What's Important, they must:

- *Communicate clear vision, goals, and performance expectations.* Managers must clearly communicate company and business unit objectives. Only when company and business unit objectives are understood can employees develop solutions that simultaneously promote personal and business objectives.

The importance of this action is brought out in one learning activity through examples provided by guest speakers. Other activities underscore this action by advising participants to include it as they role play managers developing solutions to different work/life scenarios.

- *Listen, understand, and take action to meet diverse employee and business needs.* Both managers and employees need to take responsibility for developing solutions that are acceptable for both the business and employee. To accomplish this, managers must carefully listen to and understand employees' needs and goals.

Participants clearly apply this action as they work in teams to develop solutions to different work/life dilemmas. Other learning activities strengthen participants' understanding of this action by exposing them to a variety of work/life situations through role plays, interviews, small-group discussions, or minicases.

- *Reward performance and productivity, not necessarily time spent working.* One way to encourage employees to focus on business priorities is to reward them for doing so. However, rewards are often given to employees who spend the most time working, regardless of whether or not that time was spent productively. Managers must look for ways to measure and reward productivity, not "face time."

Case studies and real-life examples gathered through a live video conference are some of the ways used to educate participants about this action.

For managers to apply the second principle, Recognize and Support the Whole Person, they must:

- *Build relationships among individuals and groups based on trust and respect.* If employees are going to be willing to discuss their lives outside of work, managers must create an environment that fosters trust and respect. Once this environment is established, employees and managers can engage in conversations to creatively address business and personal needs.

Through interviewing or a game, participants actively learn how important it is to build trusting relationships among group members.

- *Model by living in accordance with one's own values and by supporting others to live by their values.* Managers send a strong message of support when they demonstrate integration of work and other life roles in their own lives. They also send a strong message when they support employees' requests to integrate their life roles.

Required readings are often used as a way of providing participants with inspirational examples of how to live in accordance with one's values.

- *Value what employees bring to the business from their multiple life roles.* Very often employees develop skills and knowledge in their roles outside of work that are relevant to the business. Managers should recognize and value these skills and knowledge when they review employee competencies and assign tasks.

Learning activities in which participants share their own or others' work/life situations not only underscore how many different roles employees bring to the work place, they often also exemplify how outside activities actually strengthen their role as an employee.

For managers to apply the third principle, Continually Experiment in the Way Goals Are Achieved, they must:

- *Seek and promote synergies between business and other life priorities.* There are a number of changes occurring in today's business environment: restructuring, global competition, team-based decision making, and changing labor force demographics. Forward-thinking managers work with employees to create solutions that meet or exceed the requirements of these changes.

Learning activities ask participants to apply this action by solving the sample work/life dilemmas that are presented.

- *Question assumptions and encourage creative experimentation in the way work is done.* To develop new ways of getting work done, managers and employees need to experiment with solutions that challenge existing norms and assumptions. To do this, managers must work in partnership with employees to try out and evaluate new approaches to work that simultaneously improve work efficiencies and balance personal needs.

Many learning activities use cases or miniscenarios as a way to apply this action. Another learning activity uses a live videoconference as a way to help participants gather concrete examples of assumptions that must be challenged or of creative solutions that have been developed.

- *Increase organizational and employee flexibility through technology and other means.* Many work practices are derived from outdated models that assume employees must be physically present during standard business hours. However, both companies and employees now require greater flexibility. Managers must work with employees to develop solutions that optimize this shared need.

The importance of this action is underscored in a learning activity that teaches how flexibility is one of the three key elements for solving work/life dilemmas. The live videoconference also allows participants to gather real-life examples of feasible solutions.

- *Manage organizational change in ways that support work, family, and community.* When managers recognize the relationship between the organization and the families and communities that make up the organization, the likelihood of developing creative solutions that address the changing business environment as well as the needs of families and communities increases.

Learning activities that address this action do so by offering examples of ways to link larger organizational change goals to work/life integration.

SHIFTING THE FOCUS TO ORGANIZATIONS

The majority of the learning activities in this collection address the actions required of either individuals or managers to effectively integrate work and personal life. However, there are a few activities that shift the focus and concentrate on the actions required of organizations. In order to fully integrate work and personal life, change is required at the individual, managerial, *and* organizational levels. The following learning activities lead the way in addressing the organization as a whole.

- Dennis/Take This Job . . . uses a case study to evaluate the effectiveness of organizational practices around international assignments.

- Dodd-McCue/PB&J . . . examines how an organization-wide decision to become family-friendly impacts clients.

- A. Johnson/Defining . . . asks how work/life initiatives can be changed to become more fully endorsed and integrated in the operation of a company from the perspective of a work/life manager.

- Kossek/Payback . . . provides suggestions for how to measure the payback to organizations from adopting work/life initiatives.

- Leibow . . . provides an overview of the steps needed to launch an organization-wide work/life initiative.

- MacDermid/Effects . . . reviews basic information members of an organization should know about the intersection of work and personal life.

- Williams/Organization . . . equips participants with a tool for analyzing the stage of work/family responsiveness of an organization.

Even though the focus of these learning activities is on the organization, note that they also address some managerial or individual actions; therefore every learning activity is included in the classification tables.

FINDING THE LEARNING ACTIVITY YOU NEED

There are a number of ways to identify the learning activity you need.

Alphabetical Listing of Contributors

For those who are interested in a particular contributor, the guide is organized alphabetically by the last name of each contributor. In cases where more than one person contributed the learning activity, the learning activity is listed by the last name of the first author.

Summary Descriptions

You might also find it helpful to use the Summary Descriptions within each activity as a way to locate the desired learning activity. A quick read of these short descriptions provides an excellent way to get a feel for the variety of learning activities included in the collection. Each summary provides a general description of the focus of the activity and a description of the process that is used.

Classification by Work/Life Actions

You might also be interested in addressing one or more of the actions associated with the principles of effectively integrating work and personal life. Every learning activity has been classified by these actions. Up to five actions are included in each classification. They are then ranked from 1 to 5: 1 indicates the action most directly addressed and 5 indicates the fifth most important action addressed.

Many learning activities jointly address actions required of the individual and manager. However, some learning activities only focus on the actions required of individuals, in which case an N/A (not applicable) will appear by their name on the table classifying managerial actions. Others only focus on the actions required of managers, in which case an N/A will appear by their name on the table classifying individual actions. See Tables 1 and 2 at the end of the Introduction, which classify the learning activities by individual and managerial actions.

Classification by Method of Learning

Some of you might be interested in a particular method of teaching or training. All learning activities have been classified by the primary method of training. Although most combine a number of methods, the classification reflects the one or two methods used as the focal point of the learning activity. Table 3 presented at the end of the Introduction classifies each contribution by the method of learning. Following is a list of the range of methods used in the guide.

- *Case Study.* These learning activities use a case study or a series of minicases to illustrate their point.

- *Communication Process.* Instead of focusing on content, these learning activities describe a process that can be followed to encourage the sharing of information and ideas.

- *Guest Presenter.* By bringing in a guest speaker, these learning activities use real-life experiences to underscore their focus.

- *Interview.* These learning activities have participants conduct interviews to expand their understanding of work/life issues.

- *Lecture/Presentation.* Although many of the learning activities include a lecture or full-group discussion as one step in their process, these learning activities use a presentation style as their primary method of conveying information.

- *Life Plan.* One way trainers allow participants to learn about themselves is to have them reflect on where they have been or where they are going in their lives. These learning activities use timelines and other techniques to help participants reflect on or visualize their life plan.

- *Organization Analysis.* These learning activities introduce participants to tools that can be used to evaluate the level of need for work/life initiatives within an organization.

- *Reading and Analysis.* Most descriptions of the learning activities include a list of resources that can be used to enhance the learning of participants. However, these learning activities *focus* on readings as the main source of information to illustrate their point.

- *Role Play.* These activities have participants act out different roles enabling participants to understand the variety of viewpoints one might encounter when integrating work and personal life.

- *Self-Assessment.* In these activities, trainers use exercises or introspective questions to help participants reflect on who they are or what is important to them as way of learning about themselves.

- *Simulation/Game.* Through engaging games or a staged debate, these learning activities use a high-energy activity to illustrate their central focus.

- *Small-Group Discussion.* Although many learning activities use small-group discussions as one of the methods within their learning activities, these activities use this as their primary method focusing the energy of a small group to deeply assess questions from the learning activity.

REFLECTIONS ON THIS COLLECTION

What We Hope We've Accomplished

It is our hope that this collection of learning activities and its organizing framework make a valuable contribution to the advancement of the work/life field. The descriptions of the principles and their associated actions are intended to provide a model that individuals and managers can apply in order to transform their own lives and the lives of their employees. The learning activities provide means of helping participants develop greater capacity to enact these principles, in many cases by learning from the act of applying them.

This collection underscores the fact that change must occur at different levels in order to create lasting solutions to the dilemmas of work/life integration. The most meaningful changes seem to occur as a result of simultaneously examining and altering one's personal life, the interactions among members of a work group, and the influences of the larger organization. You can choose among learning activities that focus on changes required of individuals, changes required of managers, or changes required of organizations. Or, you can use the volume to develop a teaching or training curriculum that addresses all three levels of change. (See the Epilogue for an example of a teaching syllabus that uses a number of learning activities from this guide to address all three levels of change.)

Finally, it is our hope that this collection encourages you to see that, when enacted, the principles for effectively integrating work and personal life help employees and managers identify creative solutions to both business *and* personal dilemmas. Although it may seem counterintuitive, the principles illustrate that the natural tensions between work and personal life can and should be seen as opportunities for creating new solutions to dilemmas faced in work processes and in employees' lives beyond work.

Missing Pieces and the Challenges Ahead

When we review this collection as a whole, we observe that not all principles and actions are equally represented. For example, one-third, or thirteen, of the learning activities rank the individual action, Clarify Life Priorities and Examine Choices Purposefully, as the most important action addressed by the activity. This suggests that the need to clarify life priorities and examine choices purposefully is indeed the best starting point for effectively integrating work and personal life. There is little doubt that unless individuals are clear about what they want, they will lack a reference point for future decisions and lack the ability to develop solutions that bring them closer to their goals.

However, in order to integrate work and personal life, we believe that individuals and managers must take responsibility for applying all three principles and must therefore continually improve their capacity to do so. Yet our collection does not focus equally on all three principles. This is because most organizations today address the issue of work/life integration from the standpoint of individual accommo-

dation. Typically, it is left up to the individual to advocate for changes that will enhance their ability to integrate work and personal life. Managers then respond to individual requests presented to them. Our collection of learning activities reflects this reality. The majority of learning activities focus on teaching individuals how to clarify what they need and on teaching managers how to respond to individual requests for change. Indeed, the second most frequently addressed action is about managers listening, understanding, and taking action to meet diverse employee and business needs. Seven learning activities address these important actions.

In an approach where managers only respond to requests, however, and no one proactively addresses the collective need for change, organizations miss out on opportunities to leverage the current tensions between work and personal life to create changes that might generate larger benefits. Yet for individuals to address these larger goals and thus generate value for organizations, they must first feel that their lives at work and outside of work are recognized and supported. Judging by the relatively few learning activities in this volume that address managerial actions associated with the second principle, Recognize and Support the Whole Person, this seems to be where change efforts are least directed. There are only eight learning activities that focus on managerial actions associated with this principle, and of them, only two rank the associated actions as most important.

The second principle (and the individual and managerial actions associated with it) provides a critical link between the first and last principles. In order for individuals and managers to develop solutions that address work and personal dilemmas, individuals need to be able to freely discuss their outside lives. To enable this, managers must build relationships among individuals and group members based on trust and respect, model by living in accordance with their own values and by supporting others to live by their values, and value what employees bring to the business from their different life roles; therefore, one important next step in the work/life field must be the development of useful initiatives that inform managers about the importance of the second principle and how to enact it.

It is clear that the nature of how work is organized is evolving rapidly. Slow-moving, steep hierarchies are giving way to lean, team-based structures that require speed and flexibility. Employees are also changing. For many individuals, commitment to a business derives more from opportunities for freedom and flexibility than it does from a chance to climb the corporate ladder. Going forward, organizations need people who are flexible and committed to business goals; employees need organizations that are both adaptable and committed to creating opportunities for them. New skills and attitudes are needed, as are new relationships based on trust and respect between managers and employees, which build foundations of flexibility that encourage people to challenge assumptions about what, where, and how work is done. It is our hope that greater capacity to implement all three principles will result from the use of the learning activities in this book and that people will be able to live more fulfilling personal lives while contributing to constructive change at work.

The accompanying table classifies each learning activity by the individual actions below. Up to five actions are included in each classification. They are ranked from 1 to 5: 1 indicates the action most directly addressed and 5 indicates the fifth most important action addressed.

INDIVIDUAL ACTIONS

1. Clarify life priorities and examine choices purposefully.

2. Communicate needs and feelings; creatively negotiate to meet personal and company needs.

3. Act in a way that is consistent with one's values.

4. Proactively build relationships and create trust, goodwill, and common ground.

5. Manage boundaries: understand how to integrate and separate different life roles.

6. Experiment with new ways to meet competing priorities.

7. Anticipate demands and plan effectively.

8. Be flexible, creative, and spontaneous in work, family, and other life roles.

TABLE 1. Classification by Individual Actions.

Action	1	2	3	4	5	6	7	8
Bunson/Video N/A								
Bunson/ Mingling		1		5		3	4	2
Byrd	2		5		1		4	
Clark N/A								
Clawson	1		2		5	4	3	
Cleek	1		2		3			
DeGroot N/A								
Dennis N/A								
Dodd-McCue N/A								
Friedman	1		3	2				
Frenkel	5	4						
Ginnerty	1		2				4	3
Greenhaus	2	1		3	4			5
Henderson-Loney	1		2		4	3	5	
Hinkin		1		3				
Johnson, A. N/A								
Johnson, E.		4						
Klein		5						
Kopelman	1		2					
Kossek N/A								
Leibow N/A								
Lobel/Case N/A								
Lobel/Questions	2				1			
Lobel/Scenarios	1	4	3		5			
MacDermid/ Effects	*							
MacDermid/ Managing	2		3		5		1	
Michaels	1		3					
Ospina	1		2		4	5		
Riddle	1		2				5	
Rondeau	1		3			5	4	
Seitel				1				
Shadle	1	2	3	4				
Simmers	1			3				
Williams N/A								

Key: N/A Learning activities that address only managerial actions have the designation N/A (not applicable) by the author's name.

*Although this learning activity primarily focuses on the actions required by organizations, the individual action marked with an asterisk is also addressed.

The accompanying table classifies each learning activity by the managerial actions below. Up to five actions are included in each classification. They are ranked from 1 to 5: 1 indicates the action most directly addressed and 5 indicates the fifth most important action addressed.

MANAGERIAL ACTIONS

1. Communicate clear vision, goals, and performance expectations.

2. Listen, understand, and take action to meet diverse employee and business needs.

3. Reward performance and productivity, not necessarily time spent working.

4. Build relationships among individuals and group members based on trust and respect.

5. Model by living in accordance with one's own values and by supporting others to live by theirs.

6. Value what employees bring to the business from their multiple life roles.

7. Seek and promote synergies between business and other life priorities.

8. Question assumptions and encourage creative experimentation in the way work is done.

9. Increase organization and employee flexibility through technology and other means.

10. Manage organizational change in ways that support work, family, and community.

TABLE 2. Classification by Managerial Actions.

Action	1	2	3	4	5	6	7	8	9	10
Bunson/Video		3	4					1	2	5
Bunson/ Mingling N/A										
Byrd		3								
Clark		2		1		4	3			
Clawson N/A										
Cleek							5	4		
DeGroot	3	1					2		4	5
Dennis								*		
Dodd-McCue							*	*		
Friedman		4				5				
Frenkel			3				2	1		
Ginnerty		5								
Greenhaus N/A										
Henderson-Loney N/A										
Hinkin		2								
Johnson, A.							*			
Johnson, E.		1	5				3	2		
Klein		1					2	4	3	
Kopelman N/A										
Kossek							*			
Leibow							*			
Lobel/Case	5		1				3	2	4	
Lobel/Questions		4						3		
Lobel/Scenarios		2								
MacDermid/ Effects		*								
MacDermid/ Managing		4								
Michaels N/A								2		
Ospina					3					
Riddle		3					4			
Rondeau		2								
Seitel		2	3							
Shadle		5								
Simmers	2								4	
Williams		*								

Key: N/A Learning activities that address only individual actions have the designation N/A (not applicable) by the author's name.

*Although these learning activities primarily focus on the actions required by organizations, the managerial action marked with an asterisk is also addressed.

The accompanying table classifies each learning activity by the method of learning denoted by the bullets.

TABLE 3. Classification by Method of Learning.

1. Case Study
2. Communication Process
3. Guest Presenter
4. Interview
5. Lecture
6. Life Plan
7. Organization Analysis
8. Reading
9. Role Play
10. Self-Assessment
11. Game/Simulation
12. Group Discussion

Method of Learning	1	2	3	4	5	6	7	8	9	10	11	12
Bunson/Video		•										
Bunson/Mingling									•			
Byrd				•								
Clark				•								
Clawson	•									•		
Cleek										•		
DeGroot									•			
Dennis	•											
Dodd-McCue	•											
Friedman									•			
Frenkel									•			
Ginnerty						•						
Greenhaus									•			
Henderson-Loney									•			
Hinkin									•			
Johnson, A.	•											
Johnson, E.	•											
Klein									•	•		
Kopelman							•				•	
Kossek					•							
Leibow					•							
Lobel/Case	•											
Lobel/Questions												•
Lobel/Scenarios	•											
MacDermid/Effect					•					•		
MacDermid/Managing						•						
Michaels										•		
Ospina						•		•				
Riddle						•				•		
Rondeau	•											
Seitel										•		
Shadle									•			
Simmers			•									
Williams						•						